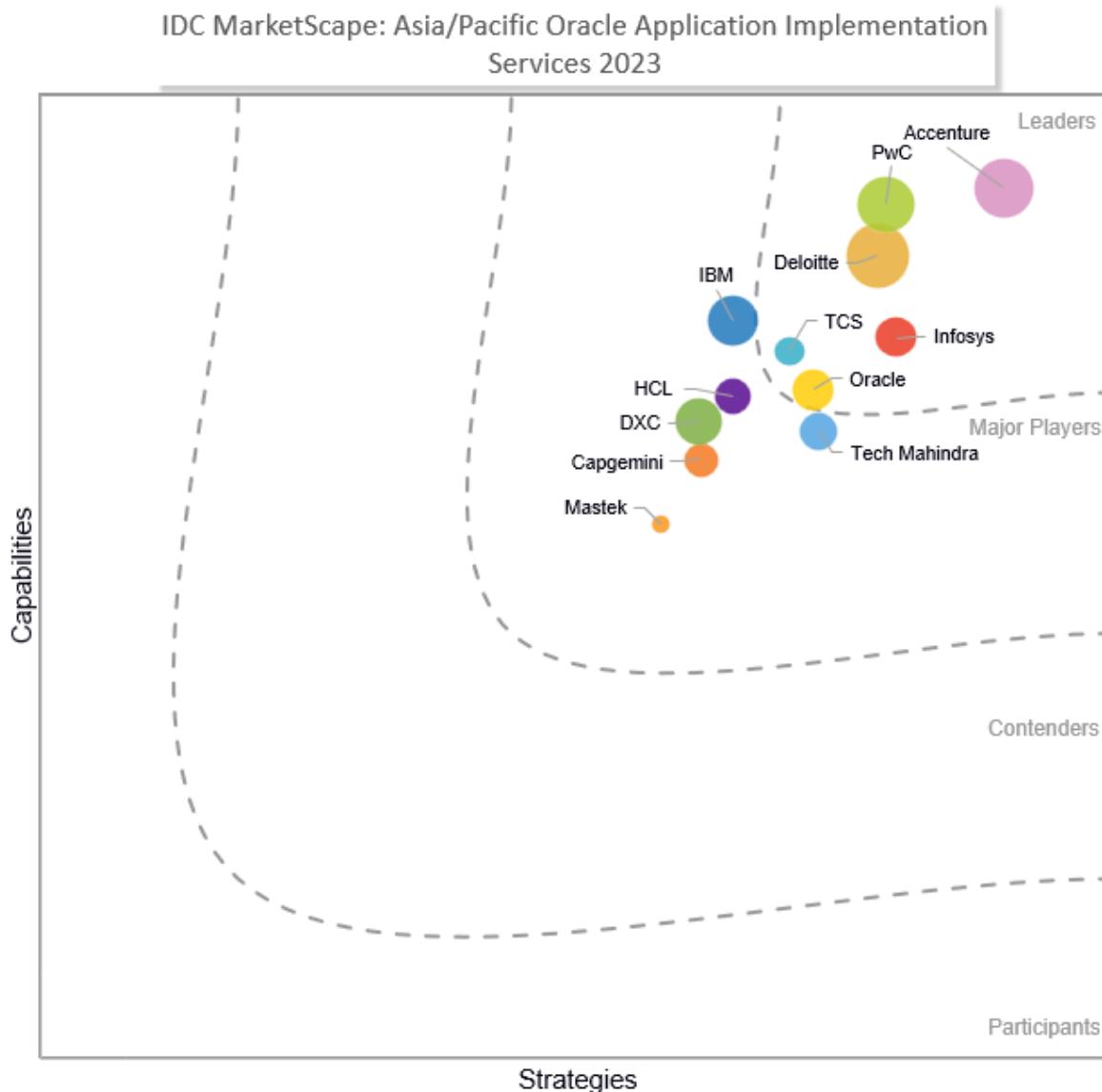


## IDC MarketScape

## IDC MarketScape: Asia/Pacific Oracle Application Implementation Services 2023 Vendor Assessment

Rijo George Thomas

**THIS MARKETSCAPE EXCERPT FEATURES: PRICEWATERHOUSECOOPERS INTERNATIONAL****IDC MARKETSCAPE FIGURE****FIGURE 1****IDC MarketScape: Asia/Pacific Oracle Application Implementation Services 2023**

Source: IDC, 2023

Please see the Appendix for detailed methodology, market definition and scoring criteria.

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Asia/Pacific Oracle Application Implementation Services 2023 (Doc #AP49625223). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Advice for Technology Buyers, Featured Vendor Profile, Appendix and Learn More. Also included are Figure 1 and Figure 2.

### IDC OPINION

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Oracle applications have a significant number of clients in Asia/Pacific, with buyers leveraging them for a wide range of use cases. As Oracle continues its investments to strengthen its cloud suite of applications, it further cements its value proposition as an enabler of digital transformation. Customers with large on-premises application footprint have embarked on a cloud migration journey not only to consolidate existing application landscapes but also transform line-of-business (LOB) and industry operations that helped them remain agile and resilient during disruptions. According to IDC's *2022 Asia/Pacific (Excluding Japan) (APEJ) Enterprise Services and Security Sourcing Survey*, 60% of the respondents that currently use Oracle applications said they plan to modernize their current application landscape to Oracle Cloud applications in the next 24 months.

Oracle's SP ecosystem plays a pivotal role in helping enterprise customers reduce the complexity of implementing Oracle's new application solutions and risks in complex cloud modernization projects. Additionally, customers migrating to Oracle software-as-a-service (SaaS) solutions also use the SP expertise in conducting cloud readiness assessments, road map development, innovation focus, and providing local talent for support to maximize the value of their Oracle investments.

This IDC study assesses Oracle application implementation vendors in the Asia/Pacific region on both the strength of their current implementation service capabilities and how well placed they are to grow the adoption of Oracle application solutions with their respective sound growth strategies. The key findings include:

- **A strong range of Oracle application service offered.** Among all the measurement criteria, Oracle application implementation vendors performed well in the "range of services" scoring criteria, suggesting that most participants had mature Oracle service practices and provided a broad range of application services. IDC also found that the gap in capabilities within the range of services criteria among Oracle partners is diminishing. For example, since the last iteration of this study, several Oracle service partners with strong technical competencies have strengthened their business consulting capabilities (either through acquisitions or talent investments) to cater to clients struggling to manage change or reimagine business processes during application modernization exercises.
- **Understanding why clients buy Oracle solutions.** From the overall assessment of the strategy criteria of the participating vendors, IDC observed that vendors did well in the business alignment criteria compared with the last iteration of this study. Vendors continued to align their investment priorities to address the key business priorities of their customers, developing solutions with an understanding of why clients buy Oracle. IDC analysis found that some vendors excelled at this approach by effectively utilizing a range of internally developed intellectual properties (IPs) and an experienced workforce.
- **Localization driving market success.** Vendors vary in terms of regional delivery capabilities, but from the last iteration of this study, vendors made several strategic investments to plan for future growth in Asia/Pacific, including investments in local talent to support regional customers, leadership hires to strengthen client relationships and delivery, and IPs to differentiate solution delivery for key market units.

- **Oracle strengthening co-innovation programs with partners in Asia/Pacific.** Oracle continues to empower its partner ecosystem through several co-innovation and market development programs. Oracle partners strategically leveraging this partnership continue to see momentum in their deal pipelines and customer success stories. IDC observed noticeable differences in the level of engagement between vendors and Oracle in some market units in Asia/Pacific. IDC recommends enterprise buyers to place a strong emphasis on evaluating the maturity of the partner's relationship with Oracle before selecting an implementation partner.
- **Oracle SaaS adoption in the Asia/Pacific region growing steadily.** Oracle SaaS solutions are continuing to mature in terms of their capabilities and use cases in Asia/Pacific, motivating implementation vendors to channelize investments to pursue the growing opportunities in the region. The current SaaS implementation revenue share of a few vendors stands above 50% of their overall Oracle application implementation services revenue, indicating a steady increase in business growth, especially for services around enterprise resource planning (ERP), supply chain management (SCM), and enterprise performance management (EPM) solutions in the Asia/Pacific region.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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This evaluation does not offer an exhaustive list of all the players in the Asia/Pacific Oracle application implementation SP ecosystem. IDC narrowed down the field of players based on the following criteria and subsequently collected and analyzed data on these nine implementation SPs for this IDC MarketScape:

- **Revenue.** Each SP was required to have a total revenue (from Oracle application implementation services) that exceeded US\$20 million in Asia/Pacific in 2022.
- **Geographic presence.** Each vendor was required to have service delivery capabilities in at least three subregions among Australia and New Zealand (ANZ), the Greater China Region and South Korea (GCR + South Korea), Southeast Asia, India, and Japan.
- **Service capabilities.** The vendor should have demonstrated end-to-end service capabilities around Oracle application implementation, including design/consulting, migration, customizations, and systems integration.
- **Products covered.** SPs provide implementation services around any of the three application product categories: cloud applications (Oracle Fusion Applications [mandatory] – ERP, SCM, human capital management, customer experience (CX), EPM, and NetSuite), on-premises applications (E-Business Suite [EBS], Peoplesoft, JD Edwards, Hyperion, Siebel Systems), and industry applications.

## ADVICE FOR TECHNOLOGY BUYERS

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This IDC study represents a vendor analysis and assessment of the 2023 Asia/Pacific Oracle application implementation services market through the IDC MarketScape model. This research explains vendors' success in the Oracle application implementation services marketplace and how well placed they are to grow in the Asia/Pacific region.

Based on this study, IDC recommends that buyers consider the following recommendations before starting new Oracle application implementations or while embarking on an application transformation journey:

- **A comprehensive road map.** The road to implementation will have several unforeseen challenges. Organizations need to address LOB concerns, such as security, cost, skills, time to market, customizations, talent, and so forth, before the implementation kicks off. Hence, it is necessary that enterprises create a holistic modernization road map before embarking on an implementation and SP selection journey.

- **Oracle application product expertise.** IDC's analysis discovered that although vendors within the Oracle partner ecosystem demonstrated strong overall expertise in Oracle cloud and on-premises application products, there were instances in which the partner did not meet customer expectations in implementing specific modules in large application modernization and business transformation projects. When evaluating implementation partners, assess their proficiency in all the required modules and ability to tailor solutions to your business needs. Customers might be forced to consider other niche or third-party vendors to fill any gaps that may arise as the Oracle application implementation progresses, resulting in cost overruns.
- **Expertise outside of the Oracle application practice.** A successful Oracle transformation requires the SP to have expertise outside of the Oracle universe to enable strong back-office and front-office integration. Consider the partner's ability to provide services around integration with business systems outside of the Oracle technology stack in the organization to enhance the value of Oracle investments.
- **In-country/regional presence.** Many implementation SPs with a significant customer base in the West have a limited presence in Asia/Pacific. Considering the partner's local presence, ability to deliver support with local consultants, and plans to scale in the region will be a good measure to assess the vendor's long-term commitment to the relationship and ability to provide scalable talent.
- **Momentum in generative artificial intelligence integration.** Oracle partners are in the initial phase of integrating generative artificial intelligence (AI) to their offerings to accelerate implementation timelines and reduce overall project costs. Consider the partner's ability to use generative AI for road map design, prototyping activities, testing and debugging, custom code development, support, data cleansing, and so on.
- **IT and business alignment.** If business outcomes are critical in the organization's investment rationale in Oracle solutions, evaluate the partner's approach in mapping IT outcomes to business key performance indicators (KPIs) and back up its commitments with innovative pricing models. Additionally, proactively reach out to the partner's customer references to understand the partner's capabilities in enabling outcomes critical to your industry.
- **Competitive evaluation.** Use this IDC MarketScape in contract negotiations and as a tool to not only short-list vendors for Oracle application implementation projects but also evaluate a vendor's proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise (technical, industry-based, or otherwise).

## FEATURED VENDOR SUMMARY PROFILE

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This section briefly explains IDC's key observations resulting in PwC's position in the IDC MarketScape, and provides a summary of the vendor's strengths and opportunities.

### PricewaterhouseCoopers International

According to IDC analysis and buyer perception, PricewaterhouseCoopers International (PwC) is positioned in the leaders category in 2023 IDC MarketScape for Asia/Pacific Oracle application implementation services.

PwC is a global professional service firm that provides end-to-end business and technology transformation services across the Asia/Pacific region. PwC provides end-to-end implementation services across all Oracle Cloud and on-premises portfolios of application products, including NetSuite, Oracle EBS, and PeopleSoft.

PwC continues to build on its global strategy called The New Equation, which aims to bring together its trust and consulting solutions to help Asia/Pacific client grappling with the urgency to successfully respond to change and build trust in an uncertain business environment. PwC hinges its differentiation in the Oracle application services market on its extensive experience in driving large-scale business

transformation programs in Asia/Pacific and ability to shape business-specific offerings with Oracle as the technology core to solve LOB challenges. PwC has doubled down on its efforts to enhance its Oracle delivery experience and leverages its Concourse delivery platform to mobilize, manage, execute, and monitor client engagements. PwC's functional and industry consulting teams have further enhanced the integrated platform with standard delivery maps to align with its user-centric business, experience, and technology (BXT) agile delivery methodology to enable long-term client success and value.

PwC maintains a strong relationship with Oracle at the product innovation and joint go-to-market levels. PwC is a strategic partner that supports Oracle's Cloud Catalyst program with mutual investments to drive cloud momentum via increased sales channel alignment, marketing, and demand generation. Additionally, PwC and Oracle have several strategic engagements in insurance, banking, healthcare, and oil and gas.

At the time of this study, IDC estimates that PwC has had a larger distribution of clients in India followed by Greater China, ANZ, Japan, and Southeast Asia. The largest verticals in PwC's Oracle application implementation services are government, technology, and insurance. Additionally, PwC has local delivery capabilities and resources in all the major market units in Asia/Pacific, with a higher distribution of Oracle application-skilled resources in India, followed by GCR, Southeast Asia, and ANZ.

## **Strengths**

PwC's strengths are:

- **Micro vertical strategy.** PwC showcased strong industry alignment, especially for select industries, as part of its micro vertical strategy. This includes industrial products, utilities, healthcare, financial services, tech, media, telecom, consumer markets, and the public sector. PwC has enhanced its industry go to market with preconfigured model systems and digital assets to guarantee tangible outcomes.
- **Access to value-added services.** PwC continues to focus on blending its service lines in consulting, tax, and assurance with its Oracle application implementation practice to enable high-value outcomes for clients. Clients engaging with PwC to drive technology-enabled industry and functional transformation projects will find these services as a value-add to maximize innovation and drive long-term growth.
- **Assets and IP for long-term success.** PwC has placed a strong emphasis on the speed and ease of adopting Oracle Cloud solutions. This is most evident in the robust portfolio of PwC's 15 industry model systems and over 250 solution IPs built on the Oracle SaaS application stack to address faster industry-specific and functional transformations. Clients with a focus on speed will benefit from a plethora of proven solutions from PwC.

## **Challenges**

PwC's challenges are:

- PwC's Oracle practice is increasing its local investments in Japan, but currently, its resource allocation dedicated for Oracle application implementations in Japan is lower compared with that for other market units in the region.
- Some clients indicated PwC needs to improve its project management capabilities.

## **Consider PwC When**

PwC is a good fit for enterprises looking for an application implementation partner with strong industry expertise and experience in delivering holistic business transformation programs with Oracle as the technology foundation. PwC's integrated solutions are key value-add in accelerating time to value.

## APPENDIX

### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here, and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represent the market share of each individual vendor within the specific market segment being assessed.

### IDC MarketScape Methodology

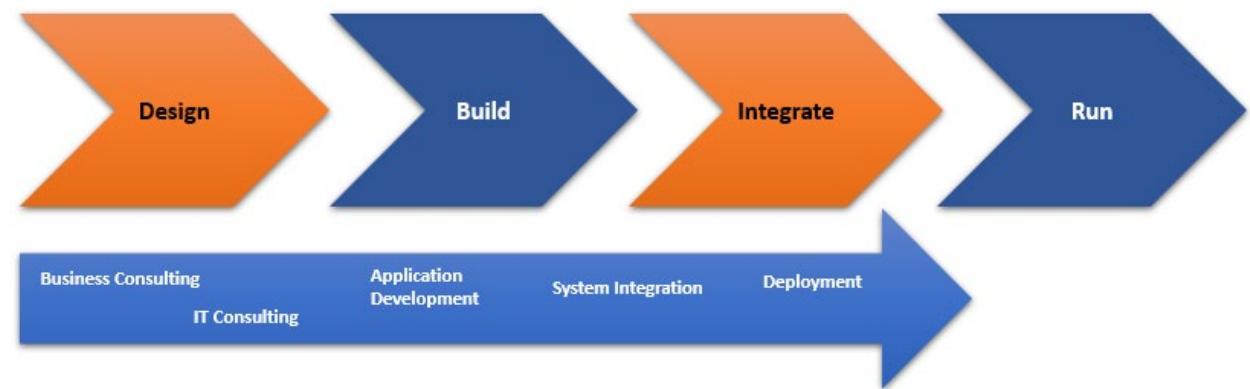
IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the inputs of IDC experts in each market. IDC analysts base individual vendor scores, and vendor positions on the IDC MarketScape, on detailed surveys and interviews with vendors, publicly available information, and end-user experiences to provide accurate and consistent assessments of each vendor's characteristics, behaviors, and capabilities.

### Market Definition

The Oracle application implementation services market covers the design, build, and integrate functions of the design-build-run function chain (see Figure 2). The design phase includes both IT and business consulting. For a detailed definition of the services markets illustrated in Figure 2, see *IDC's Worldwide Services Taxonomy, 2021* (IDC #US47191221, May 2021).

### FIGURE 2

#### IDC's Design-Build-Run Function Chain



Source: IDC, 2023

Before potential buyers evaluate an Oracle application implementation SP, they need to understand the key value propositions that current customers in Asia/Pacific perceive in their Oracle application implementation SPs. Buyers need to then correlate how well SPs can bring out these value propositions in their solutioning approach and implementation offering portfolio. Customers interviewed by IDC were generally satisfied with the services from their Oracle application implementation SPs and identified five key capabilities that are perceived as differentiators before selecting an Oracle application implementation SP. They are, in order of priority:

- The ability to deliver business outcomes
- Strong industry capabilities (industry knowledge backed by IPs and the ability to put the solution in the context of the industry)
- Providing faster time to value (focusing on driving faster time to value by shortening implementation duration and delivering value early in the implementation)
- Consulting and design capabilities (strong consulting and design capabilities and providing comprehensive vision and road map for implementations)
- Cloud capabilities (strong cloud capabilities, frameworks, public cloud partnerships)

Some of the potential areas of improvement for vendors pointed out by clients are (in order of priority):

- Engagement and pricing models
- Automation for effort reduction
- Subject matter expertise: business and Oracle products
- Cost-effectiveness
- Security posture

Accordingly, IDC has tweaked the weightage of the scoring criteria to reflect the changing dynamics of the focus of buyers and SPs.

## LEARN MORE

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### Related Research

- *Asia/Pacific Perspectives: Top Cloud Adoption Challenges Among Enterprises* (IDC #AP50335323, April 2023)
- *The Application Modernization Imperative in Asia/Pacific (Excluding Japan) - Key Updates for 2023* (IDC #AP49173323, February 2023)
- *IDC FutureScape: Worldwide Services 2023 Predictions - Asia/Pacific (Excluding Japan) Implications* (IDC #AP49984722, January 2023)
- *A Closer Look at the Opportunities to Drive Oracle Application Services in Asia/Pacific (Excluding Japan)* (IDC #AP48492622, August 2022)

### Synopsis

This IDC study uses the IDC MarketScape model to assess SPs participating in the Oracle application implementation services market with specific offerings and capabilities in the segment. It discusses the quantitative and qualitative characteristics that lead to success in the SP ecosystem. The evaluation is based on a comprehensive and rigorous framework that assesses vendors against another and highlights the factors expected to be the most influential for success in both the short and long term.

"As enterprises accelerate their plan to leverage Oracle's application stack for more complex use cases tied to IT and business outcomes, the implementation phase requires the expertise of knowledgeable partners to navigate intricacies and deliver successful outcomes," says Rijo George Thomas, research manager, IDC's IT Services Research Group in Asia/Pacific. He adds, "Implementation partners focusing on unlocking the full potential of Oracle's application solutions and

creating tailored solutions for enterprises operating in Asia/Pacific will continue to see greater success."

## About IDC

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